



# Preparing Lost Pledger's Report and Generating the Letters

# First Section - Running List of Lost Pledgers Report

## Step 1

Go To Contributions  
From the Reports Menu  
Choose Financial Analysis  
Reports  
Then 'List of Lost Pledgers'

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Rates/History/Keywds ✓  
Recap/Totals  
Billing Address  
View / Print  
Fund Filter  
Fund History Entries  
Listing Screen  
**Reports**  
Quick Posting  
Processes  
Exit Program

**Select Report:**

Fund Reports  
 All Reports

Find Open All Close All

- Financial Reports
  - Listing Reports
  - Financial Statements
  - Pledge Cards
  - Label/Envelope Reports in Upper Case
  - Label/Envelope Reports in Mixed Case
  - Tax Reports
- Financial Analysis Reports
  - Financial Comparisons by Week & Year
  - Breakdown of Funds by Amount Range
  - Monthly, Quarterly, Yearly Comparison
  - Frequency of Contributions/Payments
  - Weekly Breakdown by Amount Categories
  - Collection Rate Report
  - Summary of Grand Totals by Fund
  - Summary of Delinquency by Fund
  - Pledge Group Statistics by Amounts
  - Summary of Increases & Decreases by Year
  - Increases & Decreases by Group
  - List of Lost Pledgers / New Pledgers**
  - List of Lost Givers / New Givers
  - Goal Statistics
  - Top Givers Report
  - Ledger Confirmation Report
- Data Export/Env Co. With Fund Selections
- Barcode Reports
- 2018 Reports

Add Delete Copy Reorder User Reports

Filename: PDS2067

# Step 2

Date Range as Shown

Fund 1

Click on Next

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions  
Select a Different Report

Overview  
Select Printer  
Listing Layout  
**Select Funds**  
Additional Layout  
Select Families

Preview Report  
Print the Report  
Cancel the Report

Exit Program

**Select Funds to Print:**

Date Range to Print: 01/01/2020 Thru: 12/31/2020

Funds to Print: 1 Add a Fund to this List

Print Overpayments As: Zero (\$0.00) for the Balance Due

Fund	Title	Specify How to Print the Group
1	Church Donations	
	Church Donation	Include Group in the Report

Preview Report Print Report Back to Overview < Back Next > Cancel

# Step 3

Print Lost Pledgers (check box)

Add in Keyword (check box)

Create Keyword (type in this area)

Previous Period Beginning & Ending  
(1/1/19-12/31/19)

The screenshot shows the 'Parish Data System - Church Office' interface. The top navigation bar includes 'File', 'Information', 'Personnel', 'Sacramental Registers', 'Reports', 'Processes', and 'Administration'. Below this are icons for 'Dashboard', 'Families', 'Members', and 'Contributions'. A left sidebar contains a menu with options: 'Return to Contributions', 'Select a Different Report', 'Overview', 'Select Printer', 'Listing Layout', 'Select Funds', 'Additional Layout', 'Select Families', 'Preview Report', 'Print the Report', 'Cancel the Report', and 'Exit Program'. The main content area is titled 'Print Options:' and includes several sections: 'Print Options:' with checkboxes for 'Print Lost Pledgers' (checked) and 'Print New Pledgers' (unchecked); 'Modification Option:' with checkboxes for 'Add Family Keyword to Lost Pledgers' (checked) and 'Add Family Keyword to New Pledgers' (unchecked); 'Previous Period Beginning and Ending Dates' with 'Beginning Date' set to '01/01/2019' and 'Ending Date' set to '12/31/2019'; and 'High Values:' with a list of values from 25.00 to 750.00. A dropdown menu is set to 'List of Lost Pledgers for 2020'. At the bottom, there are buttons for 'Preview Report', 'Print Report', 'Back to Overview', '< Back', 'Next >', and 'Cancel'.

# Step 4

Include Active Families

Preview Report

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions  
Select a Different Report

Overview  
Select Printer  
Listing Layout  
Select Funds  
Additional Layout  
**Select Families**  
Preview Report  
Print the Report  
Cancel the Report  
Exit Program

**Select Families:**

List of Selections: Find

- Simple Selection - Never Saved
- New Selection

Show Only My Selections

Save Add Delete

Clear Copy Reorder

Export Sel. to a File

Import Sel. from a File

**Selection Information** Family Selections Delinquency Selections Additional Selections

Selection Information

Name: Simple Selection - Never Saved

Description:

Sortation

Sort Order: Name

Skip Families That Do not Have Any Selected Funds

Include Family Marked as Loose Collections

Active / Inactive Restrictions

Include Active Families

Include Inactive Families

Preview Report Print Report Back to Overview < Back Preview Cancel

# End of First Section

This shows you your current List of Lost Pledgers and keyword will be added to Family Screen. Top of the report dates should look like those in red circle.

PTECHS.COM, LLC												
List of Lost Pledgers / New Pledgers for Fund: 1 (01/01/2019 - 12/31/2020)												
Total Number of Families:	10											
Families in Previous Period:	7		Previous Period:	01/01/2019 - 12/31/2019								
Families in Current Period:	1		Current Period:	01/01/2020 - 12/31/2020								
Amounts Pledged												
Category	Previous Pledges	Current Pledges	New Pledges	Lost Pledges	Pledges Increased	Pledges Decreased	Remained the Same	Prev. Amt. Pledged	Curr. Amt. Pledged	Total Gain/Loss		
\$0.00 - \$25.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$25.01 - \$50.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$50.01 - \$75.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$75.01 - \$100.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$100.01 - \$150.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$150.01 - \$200.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$200.01 - \$300.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$300.01 - \$400.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$400.01 - \$500.00	1	0	0	1	0	0	0	500.00	0.00	-500.00		
\$500.01 - \$750.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$750.01 - \$1,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$1,000.01 - \$1,500.00	1	0	0	1	0	0	0	1,200.00	0.00	-1,200.00		
\$1,500.01 - \$2,000.00	2	1	0	1	1	0	0	3,380.00	1,800.00	-1,580.00		
\$2,000.01 - \$2,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$2,500.01 - \$3,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$3,000.01 - \$3,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$3,500.01 - \$4,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$4,000.01 - \$4,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$4,500.01 - \$5,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$5,000.01 - \$7,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$7,500.01 - \$10,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$10,000.01 - \$15,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
\$15,000.01 - \$10,000,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00		
<b>Total</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>3</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>\$5,080.00</b>	<b>\$1,800.00</b>	<b>(\$3,280.00)</b>		
Lost Pledgers												
Previous Pledge	ID/Env	Family Name										
\$500.00	003	Blessed Sacrament										
\$1,200.00	002	Assumption										
\$1,820.00	115	All Saints										



# Second Section – Generating Letters using Keyword

Add in a New 'Letter'

Name the Letter '2020 List of Lost Pledgers'

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Rates/History/Keywds ✓  
Recap/Totals ✓  
Billing Address

View / Print  
Fund Filter  
Find History Entries

Listing Screen  
**Reports**

Quick Posting  
Processes  
Exit Program

**Select Report:**

Fund Reports  
 All Reports

Find Open All Close All

ST (18) Follow-Up Letter #1\_Spanish  
ST (18) Follow-Up Letter #2  
ST (18) Follow-Up Letter #2\_Spanish  
ST (18) Thank You Letter  
ST (18) Thank You Letter\_Spanish  
Called to Serve as Christ Arch Export  
Vietnamese(17) Campaign Letter - Generic  
Vietnamese(17) Campaign Letter - Generic  
ST (18) Quarterly Statement  
ST (18) Quarterly Statement\_Spanish  
ST (18) Non-Pledger/Non-Giver Quarterly  
ST (18) Non-Pledger/Non-Giver Qtrly\_Span  
ST (19) Campaign Letter-Segmented  
ST (19) Campaign Ltr-Segmented\_Spanish  
ST (19) Campaign Letter - Generic  
ST (19) Campaign Letter Generic\_Spanish  
ST (19) Campaign Letter - Generic\_Vietna  
ST (19) Follow-Up Letter #1  
ST (19) Follow-Up Letter #1\_Spanish  
ST (19) Follow-Up Letter\_Vietnamese  
ST (19) Follow-Up Letter #2  
ST (19) Follow-Up Letter #2\_Spanish  
ST (19) Thank You Letter  
ST (19) Thank You Letter\_Spanish  
ST (19) Thank You Letter\_Vietnamese  
Custom TY for a pledge  
**2020 List of Lost Pledgers**

Add Delete Copy Reorder User Reports Adv. Script Save

# Modify the Body of the Letter by using similar text as shown on next page

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions  
Select a Different Report

Overview  
Select Printer  
**Letter Layout**  
Select Funds  
Select Families

Preview Report  
Print the Report  
Cancel the Report

Exit Program

### Letter Layout:

Base Font  
Set Base Font

Letterhead Style  
Style Name: Fancy Letterhead Edit Style

Letter Date Style  
Style Name: Centered Date Edit Style

Use today's date  
 Use the date:

Inside Address Style  
Style Name: Family Formal Name Edit Style

Body of the Letter  
Modify the Body of the Letter

Closing Style  
Style Name: Informal Bob Edit Style

Margin Style  
Style Name: \*Smallest Margins Edit Style

Top: 0.167" Left: 0.167"  
Bottom: 0.167" Right: 0.167"

Archdiocese of Seattle  
710 9th Avenue  
Seattle, WA 98104  
(206)903-4819  
August 13, 2019

<Fam Mailing Name>  
<Fam Address Block>  
Dear <Fam Formal Sal>.

Thank you for being such a valued member of St. XXXXXX Parish. We appreciate your generous support in 2018 and p  
the peace of mind and closeness to God that comes from sharing with others what God has given you. Your pledge of  
Pledged> (state your parish mission, goals, and accomplishments here)

We have not received your pledge yet this year and want to thank you for taking the time to fill out and return the en  
Reply Envelope. Please be as generous as possible as we strive to (again -- reiterate your parish mission and vision of  
accomplish) in 2019.

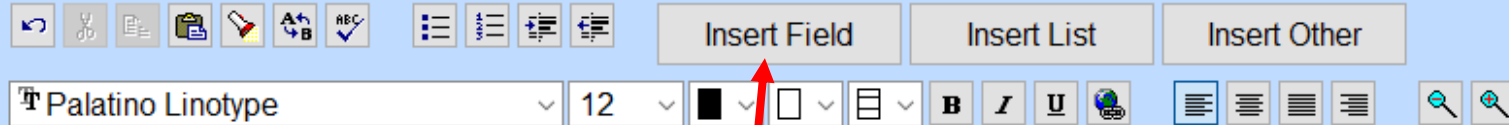
I trust that God will continue to abundantly bless you and as we go forward in this parish it is good to remember that i  
more than any of us can do alone.

I will keep you in my prayers and ask that you keep me in yours.

Sincerely,  
Bob

Preview Report Print Report Back to Overview < Back Next > Cancel





Thank you for being such a valued member of St. XXXXXX Parish. We appreciate your generous support in 2018 and pray that you are experiencing the peace of mind and closeness to God that comes from sharing with others what God has given you. Your pledge of <Fund Summary 1-19 Pledged> **(state your parish mission, goals, and accomplishments here)**

We have not received your pledge yet this year and want to thank you for taking the time to fill out and return the enclosed card in the Business Reply Envelope. Please be as generous as possible as we strive to **(again -- reiterate your parish mission and vision of what you hope to accomplish)** in 2019.

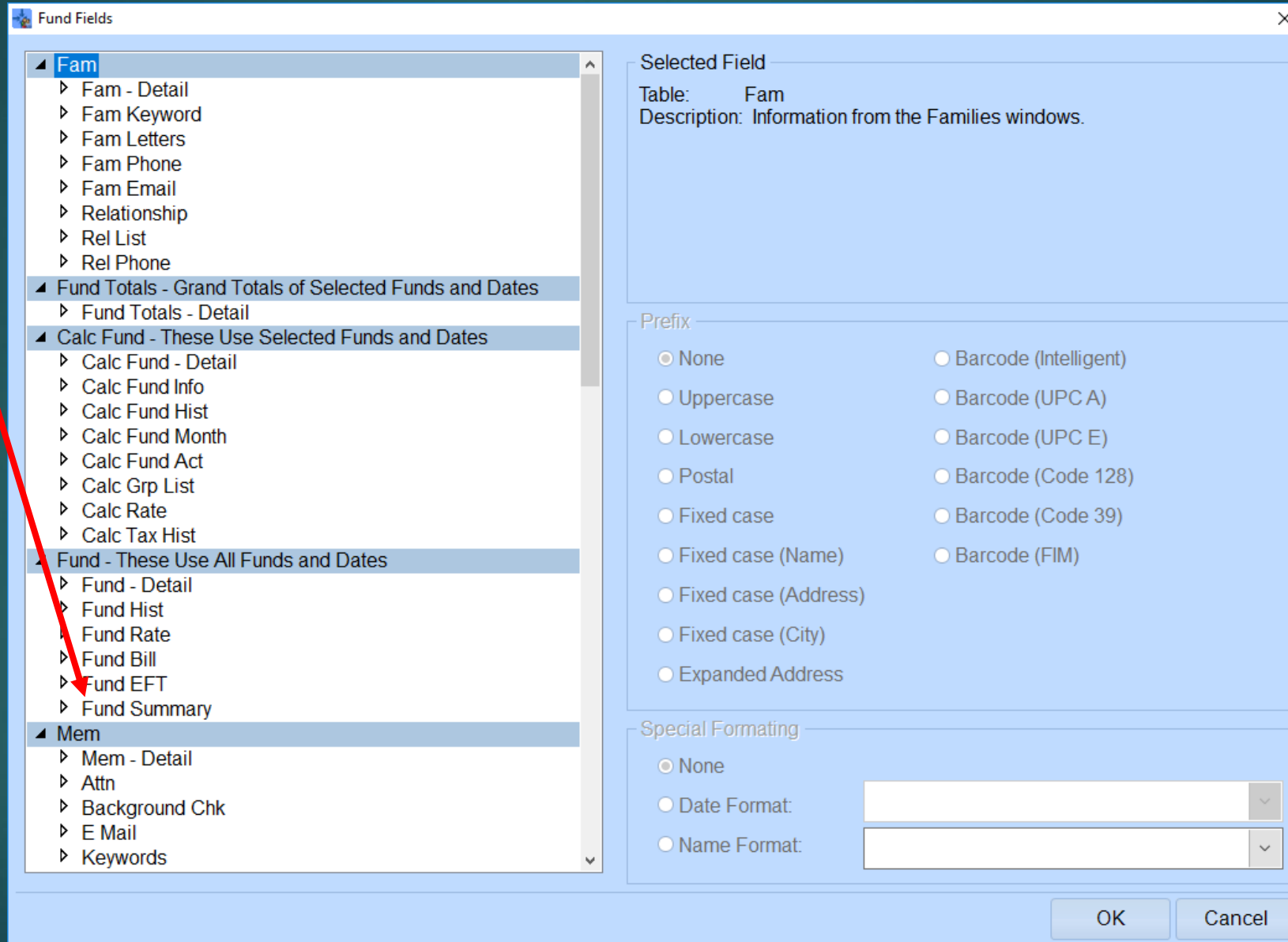
I trust that God will continue to abundantly bless you and as we go forward in this parish it is good to remember that together we can do so much more than any of us can do alone.

I will keep you in my prayers and ask that you keep me in yours.

**You will need to insert a field showing amount pledged in previous year**

**To insert this field, click here. Then see next slide for further instructions.**

# Select Fund Summary



**Fund Fields**

- ▶ **Fam**
  - ▶ Fam - Detail
  - ▶ Fam Keyword
  - ▶ Fam Letters
  - ▶ Fam Phone
  - ▶ Fam Email
  - ▶ Relationship
  - ▶ Rel List
  - ▶ Rel Phone
- ▶ **Fund Totals - Grand Totals of Selected Funds and Dates**
  - ▶ Fund Totals - Detail
- ▶ **Calc Fund - These Use Selected Funds and Dates**
  - ▶ Calc Fund - Detail
  - ▶ Calc Fund Info
  - ▶ Calc Fund Hist
  - ▶ Calc Fund Month
  - ▶ Calc Fund Act
  - ▶ Calc Grp List
  - ▶ Calc Rate
  - ▶ Calc Tax Hist
- ▶ **Fund - These Use All Funds and Dates**
  - ▶ Fund - Detail
  - ▶ Fund Hist
  - ▶ Fund Rate
  - ▶ Fund Bill
  - ▶ Fund EFT
  - ▶ Fund Summary
- ▶ **Mem**
  - ▶ Mem - Detail
  - ▶ Attn
  - ▶ Background Chk
  - ▶ E Mail
  - ▶ Keywords

**Selected Field**

Table: Fam  
Description: Information from the Families windows.

**Prefix**

- None
- Uppercase
- Lowercase
- Postal
- Fixed case
- Fixed case (Name)
- Fixed case (Address)
- Fixed case (City)
- Expanded Address
- Barcode (Intelligent)
- Barcode (UPC A)
- Barcode (UPC E)
- Barcode (Code 128)
- Barcode (Code 39)
- Barcode (FIM)

**Special Formatting**

- None
- Date Format:
- Name Format:

OK Cancel

# Select Fund 1 – 19 pledged here

Fund Fields

- ▶ Calc Rate
- ▶ Calc Tax Hist
- ▶ Fund - These Use All Funds and Dates
- ▶ Fund - Detail
- ▶ Fund Hist
- ▶ Fund Rate
- ▶ Fund Bill
- ▶ Fund EFT
- ▶ Fund Summary
  - 1-15 Paid
  - 1-15 Pledged
  - 1-16 Paid
  - 1-16 Pledged
  - 1-17 Paid
  - 1-17 Pledged
  - 1-18 Paid
  - 1-18 Pledged
  - 1-19 Paid
  - 1-19 Pledged**
  - 1-20 Paid
  - 1-20 Pledged
  - 3-12 Paid
  - 3-12 Pledged
  - 3-13 Paid
  - 3-13 Pledged
  - 3-14 Paid
  - 3-14 Pledged
  - 3-15 Paid
  - 3-15 Pledged
  - 3-16 Paid
  - 3-16 Pledged
  - 3-17 Paid
  - 3-17 Pledged

Selected Field

Field: Fund Summary 1-19 Pledged  
Type: Amount  
Description: Total amount pledged for a given fund period.

Prefix

None  Barcode (Intelligent)  
 Uppercase  Barcode (UPC A)  
 Lowercase  Barcode (UPC E)  
 Postal  Barcode (Code 128)  
 Fixed case  Barcode (Code 39)  
 Fixed case (Name)  Barcode (FIM)

None  
 Date Format:   
 Name Format:

OK Cancel

ed member of St. XXXXXX Parish. We appreciate your generous support in  
xperiencing the peace of mind and closeness to God that comes from sharing with  
. Your pledge of <Fund Summary 1-19 Pledged> (state your parish mission,  
:re)

Added Field  
will be  
shown here.

It will add this field to the  
body of the Letter (usually  
bottom of letter) which you  
can place in appropriate  
area.

Include Active Families and Skip families with no selected funds

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions  
Select a Different Report

Overview  
Select Printer  
Letter Layout  
Select Funds  
**Select Families**

Preview Report  
Print the Report  
Cancel the Report

Exit Program

**Select Families:**

List of Selections: Find

- Simple Selection - Never Saved
- New Selection

Show Only My Selections

Save Add Delete  
Clear Copy Reorder  
Export Sel. to a File  
Import Sel. from a File

**Selection Information** Family Selections Delinquency Selections Additional Selections

Selection Information

Name: Simple Selection - Never Saved  
Description:

Sortation

Sort Order: ID Number

Email the Letter If:  Send to Multiple Emails  
 Preferred is Checked  Has an Email Addr.

Include Billing Copies  
 Include Separate Statements  
 Skip Families That Do not Have Any Selected Funds  
 Include Family Marked as Loose Collections

Active / Inactive / Send No Mail Restrictions

Include Active Families  
 Include Inactive Families  
 Include Families Even If Send No Mail is Marked

Preview Report Print Report Back to Overview < Back Preview Cancel

# Additional selections should read as shown

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Contributions  
Select a Different Report

Overview  
Select Printer  
Letter Layout  
Select Funds  
**Select Families**

Preview Report  
Print the Report  
Cancel the Report

Exit Program

**Select Families:**

List of Selections: Find

- Simple Selection - Never Saved
- New Selection

Choose records where **All** of the conditions in the following sub-section are true

- 1 Fam Keyword.Description is ever equal to List of Lost Pledgers for 2020  
< Click here to add new condition >

Show Only My Selections

Save Add Delete

Clear Copy Reorder

Export Sel. to a File

Import Sel. from a File

Clear Additional Selections  Exclude rather than include the selected records.  Use Optimizer

Preview Report Print Report Back to Overview < Back Preview Cancel

Make sure you use 'is ever equal to'

Click Preview

# Letters should look like this. This is how the inserted field (1-19 pledged) looks in final letter.

Archdiocese of Seattle  
710 9th Avenue  
Seattle, WA 98104  
(206)903-4619

August 13, 2019

Assumption  
6201 33rd Ave NE  
Seattle, WA 98115

Dear Assumption,

Thank you for being such a valued member of St. XXXXXX Parish. We appreciate your generous support in 2019 and pray that you are experiencing the peace of mind and closeness to God that comes from sharing with others what God has given you. Your pledge of \$1,200.00 **(state your parish mission, goals, and accomplishments here)**

We have not received your pledge yet this year and want to thank you for taking the time to fill out and return the enclosed card in the Business Reply Envelope. Please be as generous as possible as we strive to **(again -- reiterate your parish mission and vision of what you hope to accomplish)** in 2019.